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INTELLIGENCE BRIEF

FOREIGN SHIPPING TO NORTH VIETNAM IN SEPTEMBER 1965

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FOR E W O R D

The data in this publication are preliminary and subject to modification as additional information becomes available. Significant changes may occur in data on ship arrivals and cargoes from Communist China and, to a lesser extent, in data on cargoes carried by ships of the Free World. Data on Soviet and Eastern European ship arrivals and cargoes and on Free World ship arrivals are not likely to be changed significantly. As required, changes will be reported in subsequent publications.

FOREIGN SHIPPING TO NORTH VIETNAM IN SEPTEMBER 1965

Arrivals of all foreign merchant ships at North Vietnamese ports during September were the lowest for any month in 1965.* Calls by Free World ships at North Vietnamese ports decreased to 11 in September, which is less than half of the monthly average for the first nine months of 1965, and the lowest number since April. There were no exports of apatite, North Vietnam's principal export, or of pig iron during the month. Exports of anthracite increased slightly, and the possible re-entry of Japanese-flag shipping into the coal trade with North Vietnam threatens a significant breach in US policies designed to keep Free World shipping out of the trade.

A total of 29 foreign merchant ships called at North Vietnam's ports in September, compared with 36 in August and with a monthly average of 44 thus far this year, as follows:

	<u>August</u>	<u>September</u>	<u>Monthly Average</u> <u>January-September 1965</u>
Total	<u>36</u>	<u>29</u>	<u>44</u>
Communist countries	<u>24</u>	<u>18</u>	<u>20</u>
USSR	7	3	6
Eastern Europe	3	3	4
Communist China	14	12	10
Free World	<u>12</u>	<u>11</u>	<u>24</u>

Most of the decline in foreign arrivals during September was in Communist shipping. The sharp decline in the number of Soviet arrivals, however, probably was only temporary. Of the three Soviet ships that arrived at North Vietnamese ports during the month, one was a tanker, which delivered the first shipment of Soviet petroleum since June. Calls by Chinese Communist ships, although fewer than in August, outnumbered calls by ships of all other flags. No seaborne shipments were identified as arms or ammunition during September.

The downward trend in Free World shipping to North Vietnam since January is due principally to increased US involvement in Vietnam. In July the US began to bomb the rail line leading from the mines at Lao Cai

* For details, see Tables 1 through 4.

to Haiphong. In spite of North Vietnamese efforts to restore this rail line, no apatite was available for loading at Haiphong in September. As a result, Free World shipping has continued to decline.

I. Communist Shipping

Arrivals of Communist ships at North Vietnamese ports declined from 24 in August to 18 in September but outnumbered those of Free World ships for the second consecutive month. Chinese Communist ships continued to account for the greatest share of Communist shipping with 12 calls; Soviet and Polish ships made three calls each.

The cause of the sharp decline in the number of Soviet ships calling at North Vietnamese ports is not apparent and probably is only temporary. One of the Soviet arrivals provided the first tanker delivery of Soviet petroleum to North Vietnam since June. In spite of this delivery, total imports on Soviet ships declined about 12,200 metric tons (mt) in September, principally in the categories of miscellaneous cargoes and fertilizers. Exports aboard Soviet ships also decreased by about 11,100 mt. Because of this decline, Soviet ships carried only 39 percent of identified imports in September, compared with 86 percent in August, and 10 percent of identified exports, compared with 24 percent in August.

An interesting sidelight to Chinese Communist shipping to North Vietnam occurred when the Malgorzata Fornalska, a ship of the Chinese-Polish Ocean Shipping Lines (Chipolbrok), arrived in Haiphong under the Polish flag and left Haiphong under the flag of Communist China. The transfer of this ship to the Chinese Ocean Shipping Company is the third transfer within the last two months to Chinese Communist registry of a ship jointly owned with Chipolbrok or with the Czechoslovak Ocean Shipping International Joint Stock Company (Plavba). These transfers may stem from the policy of Communist China to expand its international merchant fleet, from a reluctance of the Czechoslovak and Polish partners to be involved with the Chinese Communists in trade with North Vietnam, or from a combination of the two factors.

II. Free World Shipping

Calls by Free World ships at North Vietnamese ports decreased from 12 in August to 11 in September, which is less than half of the monthly average for the first nine months of 1965 and the lowest number

since April, when only 8 Free World ships called at North Vietnam. Of the total number of calls by Free World ships, ships of UK registry accounted for eight and Norwegian ships for three. The absence of calls by ships of other flags in September is not especially significant. Ships of at least one other Free World country are en route to North Vietnam and probably will arrive in October. Of the 10 Free World ships* calling at North Vietnam in September, 3 were under charter to Communist China, 3 to North Vietnam, 2 to the USSR, 1 to Cuba, and 1 of unknown charter.

Although the downward trend in Free World shipping to North Vietnam since January is due principally to increased US involvement in Vietnam, lack of apatite for export is the principal reason for the declines in August and September. Loadings of apatite ceased shortly after the US began in July to bomb the rail line leading from the mines at Lao Cai to Haiphong. In spite of North Vietnamese efforts to restore the line, no apatite was loaded in September. Anthracite constituted 86 percent of the exports carried by Free World ships in September; the remaining 14 percent consisted of cement and general cargo. Fertilizer and general cargo were the only identified imports on Free World ships.

Despite the slight decline in arrivals in September, Free World ships increased their share of North Vietnam's seaborne trade, as follows (in percent):

<u>Identified Seaborne Trade Carried in Free World Ships</u>	<u>September 1965</u>	<u>Monthly Average January-September 1965</u>
Total	74	69
Imports	48	32
Exports	86	82

Restrictions imposed by Japanese shipowners and seamen's unions in late March and by the Lebanese government in June continued to be effective in September. A Lebanese-flag ship under charter to Communist China, which was scheduled to load sugar in Cuba for North Vietnam, is now reported to be en route to Communist China. Rumors

* The 10 Free World ships made 11 calls at North Vietnamese ports during the month.

that the Greek government also may adopt legislation restricting Greek-flag ships from trade with North Vietnam have not been confirmed, but no Greek ships are known to be in the trade at present. The owners of a Greek-flag ship (also under charter to Communist China), which was scheduled to load flour at Savona, Italy, for North Vietnam requested the charterers to cancel the Haiphong call because of the unwillingness of the crew to call at North Vietnam.

It is possible that Japanese-flag ships may reenter the North Vietnamese trade. The Japan-Vietnam Trade Association, concerned over the continued chartering of foreign-flag ships to transport coal from North Vietnam to Japan,* sent a representative to North Vietnam in July to explore the feasibility of returning Japanese-flag ships to the trade. The Association also has asked its 70 member firms to reopen the route to Hon Gai, North Vietnam, with their own vessels. Talks also have been started with the All-Japanese Seamen's Union, which had been primarily responsible for the withdrawal of Japanese ships from the trade late in March 1965. The Japanese shipping industry is now reported to be ready to offer extra wages to crews sailing to North Vietnam under an agreement similar to that already reached with the union for crews sailing to South Vietnam. The owners hope to recoup the additional costs through increased freight rates. Reentry of Japanese-flag ships in the North Vietnamese trade would represent a significant breach in US policies designed to keep Free World shipping out of the trade.

Costs are increasing for some UK-flag ships that call at North Vietnam in the same way that costs increased for Norwegian and Danish ships. A UK-flag ship arrived at North Vietnam in September under a charter to Cuba that provided for additional war risk insurance, bonuses to crews, and the right of the master to leave the area in the event of unwarranted risk to ship or crew.

III. Cargoes

In spite of the decrease in the number of ship arrivals, the volume of identified North Vietnamese seaborne foreign trade in September increased to about 132,300 mt -- 15,100 mt more than the volume for August, which was the lowest monthly volume thus far in 1965. The combined volume of imports and exports increased slightly in September but remained well below the average for the first nine months of 1965.

* In September, 11 UK, one Malaysian, and one Soviet ship carried coal from North Vietnam to Japan.

The above data include only a small part of the cargoes carried by Chinese Communist ships. Of the twelve calls by these ships, the only imports identified were 800 mt of salt and 2,500 mt of miscellaneous exports -- feathers, rubber footwear, and clothing. No seaborne shipments were identified as arms or ammunition during September.

Anthracite was the principal export cargo in September. Loadings increased slightly from about 68,200 mt in August to 71,900 mt in September. The major recipients were Japan and Cuba. Shipload quantities also moved to Singapore and Communist China. Anthracite shipped to Japan totaled 39,000 mt, 11,000 mt less than the 50,000 mt that Japanese industry reportedly requires each month from North Vietnam.

No exports of pig iron from North Vietnamese ports were reported for September. Exports of this commodity, however, vary widely from month to month. Thus, although pig iron shipments averaged more than 5,000 mt per month during the first eight months of the year, they fell to 136 mt in April, and none moved at all in May.

The volume of imports arriving in North Vietnam by sea rose from about 32,500 mt in August to 40,700 mt in September. The volumes of both petroleum and fertilizer increased, and shipments of bulk food-stuffs and timber, which ceased temporarily in August, were resumed. The volumes of all the commodities imported were below the monthly average for the same commodities during the preceding eight months of 1965.

Table 1

Foreign-Flag Ship Arrivals in North Vietnam
August, September, and January-September 1965

Flag	August		September		January-September	
	Number	Percent of Total a/	Number	Percent of Total a/	Number	Percent of Total a/
Total	<u>36</u>	<u>100.0</u>	<u>29</u>	<u>100.0</u>	<u>399</u>	<u>100.0</u>
Communist countries	<u>24</u>	<u>66.7</u>	<u>18</u>	<u>62.1</u>	<u>187</u>	<u>46.9</u>
USSR	7	19.4	3	10.3	58	14.5
Eastern Europe	3	8.3	3	10.3	37	9.3
Albania	1	2.8			1	0.3
Bulgaria					2	0.5
Czechoslovakia					4	1.0
Poland	2	5.6	3	10.3	30	7.5
Communist China	<u>14</u>	<u>38.9</u>	<u>12</u>	<u>41.4</u>	<u>92</u>	<u>23.1</u>
Free World	<u>12</u>	<u>33.3</u>	<u>11</u>	<u>37.9</u>	<u>212</u>	<u>53.1</u>
Cyprus	1	2.8			1	0.3
France					1	0.3
Greece					25	6.3
Italy					1	0.3
Japan					37	9.3
Lebanon					9	2.3
Liberia					3	0.8
Malta	1	2.8			2	0.5
Netherlands					5	1.3
Norway	3	8.3	3	10.3	26	6.5
Panama					1	0.3
United Kingdom	7	19.4	8	27.6	101	25.3

a. Because of rounding, components may not add to totals shown.

Table 2

Tonnage of Foreign-Flag Ship Arrivals in North Vietnam a/
August, September, and Cumulative January-September 1965

Flag	August		September		Cumulative	
	Number	Thousand Gross Register Tons	Number	Thousand Gross Register Tons	Number	Thousand Gross Register Tons
Total	<u>36</u>	<u>188.8</u>	<u>29</u>	<u>140.0</u>	<u>399</u>	<u>1,935.7</u>
Communist countries	<u>24</u>	<u>124.6</u>	<u>18</u>	<u>81.5</u>	<u>187</u>	<u>936.6</u>
USSR	7	57.2	3	23.9	58	369.7
Eastern Europe	3	22.4	3	19.1	37	254.8
Communist China	14	45.0	12	38.5	92	312.1
Free World	<u>12</u>	<u>64.2</u>	<u>11</u>	<u>58.5</u>	<u>212</u>	<u>999.1</u>

a. Many Soviet and Eastern European ships calling at North Vietnamese ports pick up or discharge only small parts of their total cargoes in North Vietnam, and many of the Free World ships merely pick up export cargoes. For this reason, with the possible exception of Chinese Communist ships, the aggregate tonnage of ships calling does not correspond to the actual volume of cargoes moving into and out of North Vietnam. These data are of value, however, as indications of relative changes in the volume of shipping.

Table 3

Identified North Vietnamese Imports
 Carried by Foreign-Flag Ships a/
 September 1965

Thousand Metric Tons

Flag	Commodity					Total
	Ammonium Sulfate and Other Fertilizers	Petro-leum	Grain and Other Bulk Foodstuffs	Miscel-laneous		
Total	<u>9.3</u>	<u>10.7</u>	<u>4.4</u>	<u>16.3</u>	<u>40.7</u>	
Communist countries	0	<u>10.7</u>	<u>4.4</u>	<u>6.2</u>	<u>21.3</u>	
USSR		10.7	0.7	4.4	.15.8	
Eastern Europe			3.7	1.0	4.7	
Communist China <u>b/</u>				0.8	0.8	
Free World	<u>9.3</u>	0	0	<u>10.1</u>	<u>19.4</u>	

a. Identified imports include some estimates of bulk cargoes using methods which have proved to be highly reliable.

b. An additional unknown quantity of imports was carried.

Table 4

Identified North Vietnamese Exports
Carried by Foreign-Flag Ships a/
September 1965

Flag	Commodity				Total
	Coal	Apatite	Cement	Miscel- laneous	
Total	<u>71.9</u>	<u>0</u>	<u>8.0</u>	<u>11.7</u>	<u>91.6</u>
Communist countries	<u>4.0</u>	<u>0</u>	<u>0</u>	<u>8.7</u>	<u>12.7</u>
USSR	4.0			5.5	9.5
Eastern Europe				0.6	0.6
Communist China <u>b/</u>				2.5	2.5
Free World	<u>67.9</u>	<u>0</u>	<u>8.0</u>	<u>3.0</u>	<u>78.9</u>

a. Identified exports include some estimates of bulk cargoes using methods which have proved to be highly reliable. Because of rounding, components may not add to totals shown.

b. An additional unknown quantity of exports was carried.

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